

Client Id: \_\_\_\_\_

.....

Handitax

MYOB

TAP

CSA

Surname: \_\_\_\_\_ Given Names: \_\_\_\_\_

Title: Mr Mrs Ms Miss Preferred Name \_\_\_\_\_

Date Of Birth: \_\_\_\_/\_\_\_\_/19\_\_\_\_ Tax File Number: \_\_\_\_\_

Medicare Number: \_\_\_\_\_ Previous Name: \_\_\_\_\_  
 (For Medical Expense Rebate Purposes)

Drivers Lic State \_\_\_\_\_ Lic No \_\_\_\_\_ Occupation: \_\_\_\_\_

Residential Address: \_\_\_\_\_

Postal Address (if different to residential) \_\_\_\_\_

Phone Home: \_\_\_\_\_ Mobile \_\_\_\_\_

Work: \_\_\_\_\_ E Mail: \_\_\_\_\_ @ \_\_\_\_\_

Contact & Phone No. (e.g. Mother): \_\_\_\_\_

Financial Institute (Bank): \_\_\_\_\_ Branch: \_\_\_\_\_

BSB: \_\_\_\_\_ Acc. No.: \_\_\_\_\_

\*Spouse Details: Title: Mr Mrs Ms Miss Surname: \_\_\_\_\_  
 (\* wife/husband or de facto with whom you are currently in a marriage like relationship with, but are not separated from)

Given Names: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/19\_\_\_\_

Children: - all your children under the age of 25 even if they don't live with you, or you don't see them

Name	Date Of Birth	Do they live with you?	
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>
	/ /	Y <input type="checkbox"/>	N <input type="checkbox"/>

*I understand the responsibility for the accuracy and completeness of the particulars and information required to comply with the law rests with myself. I confirm that I have been made aware of my record keeping obligations including those relating to substantiation.*

*I also understand that if I fail to pay my preparation fee on time, an accounting fee of \$25 will be incurred for each month payment is overdue.*

*I declare the information in this form to be true and correct to the best of my knowledge.*

*I hereby appoint Susan G Honey (Tax Agent 68447005) to act as my tax agent and to use PO Box 1532, Wodonga, Vic, 3689 as my address for service of Notices.*

Signed \_\_\_\_\_ Date \_\_\_\_\_

**Important Notice To Applicant(s) For Credit (Section 18(E)(1) Privacy Act 1988)**

**Notice of disclosure of your credit information to a credit reporting agency. (Privacy Act 1988)**

Susan G Honey trading as Aaction Business Advice may give information about you to a credit reporting agency, for the following purposes:

- to obtain a consumer credit report about you, and/or
- to allow the credit reporting agency to create or maintain a credit information file containing information about you.

The information is limited to:

- Identity particulars - your name, sex, address (and the previous two addresses) date of birth, name of employer, and drivers licence number.
- your application for credit or commercial credit - the fact that you have applied for credit and the amount.
- The fact that Susan G Honey trading as Aaction Business Advice is a current credit provider to you.
- loan repayments which are overdue by more than 60 days, and for which debt collection action has started.
- advice that your loan repayments are no longer overdue in respect of any default that has been listed.
- information that, in the opinion of Susan G Honey trading as Aaction Business Advice you have committed a serious credit infringement (that is, fraudulently or shown an intention not to comply with your credit obligations).
- dishonoured cheques - cheques drawn by you for \$100 or more which have been dishonoured more than once.
- that credit provided to you by Susan G Honey trading as Aaction Business Advice has been paid or otherwise discharged.

**Period to which this understanding applies**

This information may be given before, during or after the provision of credit to you.

**Statement By Applicant (s) For Credit**

Please read carefully before signing. Where there is more than one applicant, each applicant must sign.

**1. Giving information to a Credit Reporting Agency (Section 18E(8)(c) Privacy Act 1988)**

Susan G Honey trading as Aaction Business Advice has informed me that it may give certain personal information about me to a credit reporting agency.

**2. Access to Commercial Credit Information (Section 18L(4) Privacy Act 1988)**

I/we agree that Susan G Honey trading as Aaction Business Advice may obtain information about me/us from a business which provides information about the commercial credit worthiness of persons for the purpose of assessing my/our application for consumer credit.

**3. Access to Consumer Credit Information (Section 18K(1)(b), Privacy Act 1988)**

I/we agree that Susan G Honey trading as Aaction Business Advice may obtain a consumer credit report containing information about me from a credit reporting agency for the purpose of assessing my/our application for commercial credit.

**4. Exchange of Credit Worthiness Information (Section 18N, Privacy Act 1988)**

I/we agree that Susan G Honey trading as Aaction Business Advice may exchange information with those credit providers named in this application or named in a consumer credit report issued by a credit reporting agency for the following purposes;

- to assess an application by me/us for credit
- to notify other credit providers of a default by me/us
- to exchange information with other credit providers as to the status of this loan where I am in default with other credit providers
- to assess my/our credit worthiness.

I /we understand that the information exchanged can include anything about my/our credit worthiness, credit standing, credit history or credit capacity that credit providers are allowed to exchange under the Privacy Act.

**5. Agreement to a credit provider being given a consumer credit report by a credit reporting agency to assess a guarantor (Section 18K 1(c) Privacy Act 1988)**

I/we agree the Susan G Honey trading as Aaction Business Advice may obtain from a credit reporting agency a consumer credit report containing information about me/us for the purpose of assessing whether to accept me/us as a guarantor for credit applied for by, or provided to, the borrower(s) [named in agreement]. I/we agree that this agreement commences from the date of this agreement and continues until the credit covered by the borrower(s) application ceases.

**6. Agreement to a credit provider disclosing a report including a consumer credit report to potential or existing guarantor (Section 18K (1) Privacy Act 1988)**

I/we agree that Susan G Honey trading as Aaction Business Advice may give to a person who is currently a guarantor, or whom I/we indicated is considering becoming a guarantor, a credit report containing information about me/us for the purpose of ..... deciding whether to act as a guarantor, or to keep ..... informed about the guarantee. I/we understand that the information disclosed can include anything about my/our credit worthiness, credit standing, credit history or credit capacity that credit providers are allowed to disclose under the Privacy Act, and includes a credit report.

Name (please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_